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Please find below and/or attached an Office communication concerning this application or proceeding.

The time period for reply, if any, is set in the attached communication.

Office Action Summary	Application No.	Applicant(s)	
	10/669,142	BLYASHOV, SERGEY	
	Examiner	Art Unit	
	Kyle R. Stork	2178	

-- The MAILING DATE of this communication appears on the cover sheet with the correspondence address --
Period for Reply

A SHORTENED STATUTORY PERIOD FOR REPLY IS SET TO EXPIRE 3 MONTH(S) OR THIRTY (30) DAYS, WHICHEVER IS LONGER, FROM THE MAILING DATE OF THIS COMMUNICATION.

- Extensions of time may be available under the provisions of 37 CFR 1.136(a). In no event, however, may a reply be timely filed after SIX (6) MONTHS from the mailing date of this communication.
- If NO period for reply is specified above, the maximum statutory period will apply and will expire SIX (6) MONTHS from the mailing date of this communication.
- Failure to reply within the set or extended period for reply will, by statute, cause the application to become ABANDONED (35 U.S.C. § 133). Any reply received by the Office later than three months after the mailing date of this communication, even if timely filed, may reduce any earned patent term adjustment. See 37 CFR 1.704(b).

Status

- 1) Responsive to communication(s) filed on 09 April 2007.
- 2a) This action is FINAL. 2b) This action is non-final.
- 3) Since this application is in condition for allowance except for formal matters, prosecution as to the merits is closed in accordance with the practice under *Ex parte Quayle*, 1935 C.D. 11, 453 O.G. 213.

Disposition of Claims

- 4) Claim(s) 1-37 is/are pending in the application.
- 4a) Of the above claim(s) _____ is/are withdrawn from consideration.
- 5) Claim(s) _____ is/are allowed.
- 6) Claim(s) 1-37 is/are rejected.
- 7) Claim(s) _____ is/are objected to.
- 8) Claim(s) _____ are subject to restriction and/or election requirement.

Application Papers

- 9) The specification is objected to by the Examiner.
- 10) The drawing(s) filed on _____ is/are: a) accepted or b) objected to by the Examiner.
 Applicant may not request that any objection to the drawing(s) be held in abeyance. See 37 CFR 1.85(a).
 Replacement drawing sheet(s) including the correction is required if the drawing(s) is objected to. See 37 CFR 1.121(d).
- 11) The oath or declaration is objected to by the Examiner. Note the attached Office Action or form PTO-152.

Priority under 35 U.S.C. § 119

- 12) Acknowledgment is made of a claim for foreign priority under 35 U.S.C. § 119(a)-(d) or (f).
- a) All b) Some * c) None of:
 1. Certified copies of the priority documents have been received.
 2. Certified copies of the priority documents have been received in Application No. _____.
 3. Copies of the certified copies of the priority documents have been received in this National Stage application from the International Bureau (PCT Rule 17.2(a)).

* See the attached detailed Office action for a list of the certified copies not received.

Attachment(s)

- | | |
|---|---|
| 1) <input type="checkbox"/> Notice of References Cited (PTO-892) | 4) <input type="checkbox"/> Interview Summary (PTO-413) |
| 2) <input type="checkbox"/> Notice of Draftsperson's Patent Drawing Review (PTO-948) | Paper No(s)/Mail Date: _____ |
| 3) <input type="checkbox"/> Information Disclosure Statement(s) (PTO/SB/08)
Paper No(s)/Mail Date: _____ | 5) <input type="checkbox"/> Notice of Informal Patent Application |
| | 6) <input type="checkbox"/> Other: _____ |

DETAILED ACTION

1. This non-final office action is in response to the Request for Continued Examination filed 9 April 2007.
2. Claims 1-37 are pending. Claims 33-37 are newly added. Claims 1, 7, 19, 24, 29, and 33 are independent claims.

Claim Rejections - 35 USC § 102

The following is a quotation of the appropriate paragraphs of 35 U.S.C. 102 that form the basis for the rejections under this section made in this Office action:

A person shall be entitled to a patent unless –

(e) the invention was described in (1) an application for patent, published under section 122(b), by another filed in the United States before the invention by the applicant for patent or (2) a patent granted on an application for patent by another filed in the United States before the invention by the applicant for patent, except that an international application filed under the treaty defined in section 351(a) shall have the effects for purposes of this subsection of an application filed in the United States only if the international application designated the United States and was published under Article 21(2) of such treaty in the English language.

3. Claims 1, 2, 4, 7, 8, 11, 13, 15, 19-26, 28-32 remain rejected and 33-35 and 37 are rejected under 35 U.S.C. 102(e) as being anticipated by Wagner (U.S. Pub. No. 20030233296; publication date December 18, 2003; filed December 1, 2000).

Regarding independent claim 1, Wagner discloses a method of designing a report file used for automatic report generation, the method comprising:

- specifying a structure of the report file by defining a first report group comprised of one or more page definitions, the first report group being of a first group type selected from among a plurality of predefined group types (p.3, para. 43, 45, 46; p.6, para. 72, 73 – as demonstrated in the cited text, Wagner teaches configuring

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the report in a specific format determined by the group and the page definitions with the group being a type of tax return and the definitions being the information to include);

- associating a first data source with the first report group (p.2, para. 34; p.3, para. 41, 45; p.6, para. 70 – as demonstrated in the cited text, Wagner teaches the IRS database being associated with the federal tax return);
- identifying one or more fields for inclusion within each of the one or more page definitions (p.3, para. 43, 46; p.6, para. 71, 72 – as demonstrated in the cited text, Wagner teaches identifying information to be included in the report); and
- specifying an association between content from the first data source and each of the one or more fields (p.3, para. 43, 46; p.6, para. 71, 72 – as demonstrated in the cited text, Wagner teaches an association between retrieved content and the fields since the content is filtered to be included in a report).

Regarding dependent claim 2, Wagner discloses the method of claim 1 further including:

- associating one or more properties with each of the one or more fields (p.3, para. 43, 46; p.6, para. 71, 72 – as demonstrated in the cited text, Wagner teaches associating user preferences with the fields).

Regarding dependent claim 4, Wagner discloses the method of claim 1 wherein:

- the first report group is specified to also include a second report group (p.4, para. 53; p.6, para. 76 – as demonstrated in the cited text, Wagner teaches multiple

forms in a form repository and generating different forms based on the same information).

Regarding independent claim 7, Wagner discloses a report generation method comprising:

- creating a report file defining a report structure based upon at least one report group comprised of or more page definitions, the report file containing information identifying one or more data sources associated with the at least one report group and field descriptive information relating to a plurality of fields included within the one or more page definitions (Fig. 1a, 1b; p.2, para. 34; p.3, para. 41, 43, 45, 46; p.6, para. 70-73 – as demonstrated in the figures and cited text, Wagner teaches creating the report in a specific format determined by the group and the page definitions with the group being a type of tax return and the definitions being the information to include, the IRS database is associated with the federal tax return and information to be included in the report is identified based on user preferences);
- retrieving data source information from the one or more data sources (Fig. 1a, 1b; p.2, para. 34 – as demonstrated in the figures and cited text, Wagner teaches retrieving information from multiple sources); and
- rendering an output report document based upon the report file and the data source information, the output report document including one or more output report pages formatted consistently with each of the one or more page definitions (p.2, para. 36; p.3, para. 43-46; p.6, para. 72, 73 – as demonstrated in the cited

text, Wagner teaches creating a document based on the structure, user preferences and content retrieved from the sources).

Regarding dependent claim 8, Wagner discloses the method of claim 7 further including:

- prompting a user to enter parameter values associated with the plurality of fields and receiving the parameter values entered by the user (p.3, para. 44, 45; p.4, para. 50; p.7, para. 82 – as demonstrated in the cited text, Wagner teaches prompting a user and user preferences used with the fields).

Regarding dependent claim 11, the claim reflects the method for performing the operations of claims 1 and 4 and is rejected along the same rationale.

Regarding dependent claim 13, Wagner discloses the method of claim 7 wherein:

- the field descriptive information includes formatting information (p.3, para. 46; p.5, para. 59; p.6, para. 70, 73 – as demonstrated in the cited text, Wagner teaches formatting information included for generating a report in a specific format).

Regarding dependent claim 15, Wagner discloses the method of claim 7 wherein:

- the rendering includes concatenating first and second values corresponding to first and second items of the data source information (p.3, para. 44, 46 – as demonstrated in the cited text, Wagner teaches creating a report using the retrieved data and configuring the data into a specific format).

Regarding independent claim 19, Wagner discloses a report generation system comprising:

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- a client unit configured to execute plural client components including a report explorer application and a report designer application, the report desirer application containing a report rendering module (Fig. 2b; p.2, para. 31; p.3, para. 44-46; p.6, para. 65, 73 – as demonstrated in the figure and cited text, Wagner teaches a client connected to a network which could be the Internet and multiple users being allowed to create reports and a report repository and a report generator including formatting);
- a server unit configured to execute plural server components including a business logic module and a report writer module wherein the report writer module is configured to cooperate with the client unit in producing the report file (p.2, para. 31; p.3, para. 44, 46, 47; p.6, para. 73; p.7, para. 84 – as demonstrated in the cited text, Wagner teaches a server, commercial software and a report writer since a report is generated and displayed based on the structure and included fields); and
- a database server in communication with the server unit, the database server providing content information to the server unit in connection with production by the report rendering module of an output report document based upon the report file (p.2, para. 30, 34; p.3, para. 41, 44; p.6, para. 71, 73 – as demonstrated in the cited text, Wagner teaches a database storing information used in creating reports).

Regarding dependent claims 20 and 22, the claims reflect the system for performing the operations of claim 1 and are rejected along the same rationale.

Regarding dependent claim 21, the claim reflects the system for performing the operations of claim 1 and Figure 1a and is rejected along the same rationale.

Regarding dependent claim 23, the claim reflects the system for performing the operations of claim 7 and is rejected along the same rationale.

Regarding independent claim 24, Wagner discloses a computer-readable medium encoded with a report file used by a computer in connection with generation of an output report document, the report file comprising:

- a database query identifying a data source (Fig. 1a, 1b; p.2, para. 30, 34; p.6, para. 70 – as demonstrated in the figures and cited text, Wagner teaches querying a database to retrieve information);
- data filter information defining filter operations to be performed upon source data retrieved from the data source (p.3, para. 43, 46; p.6, para. 72 – as demonstrated in the cited text, Wagner teaches a filter module for filtering retrieved information);
- descriptive information specifying the location and appearance of the source data within pages of the output report document (p.3, para. 43, 45, 46; p.6, para. 72, 73 – as demonstrated in the cited text, Wagner teaches configuring the report in a specific format determined by the group and the page definitions including locations and appearance); and
- textual data to be displayed upon the pages of the output report document (p.5, para. 57 – as demonstrated in the cited text, Wagner teaches creating and displaying a report with text data).

Regarding dependent claim 25, the claim reflects the report file for performing the operations of claim 1 and is rejected along the same rationale.

Regarding dependent claim 26, the claim reflects the report file for performing the operations of claim 4 and is rejected along the same rationale.

Regarding dependent claim 28, Wagner discloses the report file of claim 25 further including:

- user defined script information (p.3, para. 43, 44 – as demonstrated in the cited text, Wagner teaches user preferences).

Regarding independent claim 29, the claim reflects the report file for performing the operations of claims 1, 8 and 24 and is rejected along the same rationale since Wagner teaches multiple data sources in Figures 1a and 1b.

Regarding dependent claim 30, the claim reflects the report file for performing the operations of claim 24 and is rejected along the same rationale.

Regarding dependent claim 31, the claim reflects the report file for performing the operations of claim 1 and is rejected along the same rationale.

Regarding dependent claim 32, Wagner discloses the report file of claim 29 wherein:

- the first report group is further comprised of a third report group (p.4, para. 53; p.6, para. 76 – as demonstrated in the cited text, Wagner teaches multiple forms in a form repository and generating different forms based on the same information).

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As per independent claim 33, the applicant discloses the limitations substantially similar to those in claim 1. Claim 33 is similarly rejected.

As per dependent claim 34, the applicant discloses the limitations substantially similar to those in claim 1. Claim 34 is similarly rejected.

As per dependent claim 35, the applicant discloses the limitations substantially similar to those in claim 2. Claim 35 is similarly rejected.

As per dependent claim 37, the applicant discloses the limitations substantially similar to those in claim 4. Claim 37 is similarly rejected.

Claim Rejections - 35 USC § 103

The following is a quotation of 35 U.S.C. 103(a) which forms the basis for all obviousness rejections set forth in this Office action:

(a) A patent may not be obtained though the invention is not identically disclosed or described as set forth in section 102 of this title, if the differences between the subject matter sought to be patented and the prior art are such that the subject matter as a whole would have been obvious at the time the invention was made to a person having ordinary skill in the art to which said subject matter pertains. Patentability shall not be negated by the manner in which the invention was made.

4. Claims 3 and 27 remain rejected and claim 36 is rejected under 35 U.S.C. 103(a) as being unpatentable over Wagner in view of Barritz et al. (U.S. Patent 6938027; date of patent August 30, 2005; filed August 31, 2000; provisional application filed September 2, 1999).

Regarding dependent claims 3 and 27, Wagner teaches the plurality of group types consisting of forms (p.3, para. 45) but does not disclose the plurality of group types consisting of grid and pivot table. Barritz teaches creating a report in a grid or

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table type (col. 9, lines 31-37). It would have been obvious to one of ordinary skill in the art, having the teachings of Wagner and Barritz before him at the time the invention was made, to modify group types taught by Wagner to include a grid and table as taught by Barritz, because Wagner teaches creating a financial form using a group type (p.3, para. 44, 46; p.6, para. 73) and Barritz teaches an apparatus and method for creating a financial form using a table or grid which would improve a process that involves multiple software products and computers that is laborious, repetitive, error-prone, expensive and impractical (col.3, lines 50-63; col. 9, lines 31-37).

As per dependent claim 36, the applicant discloses the limitations substantially similar to those in claim 3. Claim 36 is similarly rejected.

5. Claims 5 and 12 remain rejected under 35 U.S.C. 103(a) as being unpatentable over Wagner in view of Van Renesse (U.S. Patent 6529953; date of patent March 4, 2003; filed December 17, 1999).

Regarding dependent claim 5, Wagner teaches multiple sources (Figures 1a, 1b) but does not disclose the first group type is a pivot table type comprised of a plurality of rows and a plurality of columns, the associating including associating the first data source with the plurality of rows and a second data source with the plurality of columns. Van Renesse teaches a table with rows associated with a data source and columns associated with another source (col. 3, lines 53-57). It would have been obvious to one of ordinary skill in the art, having the teachings of Wagner and Van Renesse before him at the time the invention was made, to modify the method taught by Wagner to include a

table with rows and columns associated with sources as taught by Van Renesse, because Wagner teaches creating a form using data from multiple sources (Figures 1a, 1b; p.3, para. 44, 46; p.6, para. 73) and Van Renesse teaches creating a table with information from multiple sources (col. 3, lines 53-57).

Regarding dependent claim 12, the claim reflects the method for performing the operations of claims 1 and 5 and is rejected along the same rationale.

6. Claim 6 remains rejected under 35 U.S.C. 103(a) as being unpatentable over Wagner in view of Davis (U.S. Patent 6920608; date of patent July 19, 2005; filed May 18, 2000).

Regarding dependent claim 6, Wagner teaches selecting content to be included (p.3, para. 43, 46; p.6, para. 72) but does not disclose selecting content items from a fields tree displayed to a user. Davis teaches selecting items from a fields tree (col. 22, lines 18-20; col. 37, lines 18-21, 37-41; col. 45, lines 35-38). It would have been obvious to one of ordinary skill in the art, having the teachings of Wagner and Davis before him at the time the invention was made, to modify selecting content as taught by Wagner to include selecting content from a field tree as taught by Davis, because Wagner teaches creating a financial form using selected content (p.3, para. 44, 46; p.6, para. 73) and Davis teaches creating a financial report using content selected from a fields tree (col. 9, lines 56-58).

7. Claims 9 and 10 remain rejected under 35 U.S.C. 103(a) as being unpatentable over Wagner in view of Sweet et al. (U.S. Patent 6789080; date of patent September 7, 2004; filed March 13, 2002; continuation of application filed February 6, 2002).

Regarding dependent claim 9, Wagner teaches outputting a report document (p.3, para. 44; p.6, para. 73) but does not disclose the report document comprises a PDF document. Sweet teaches a report document created as a PDF document (col. 9, lines 44-50). It would have been obvious to one of ordinary skill in the art, having the teachings of Wagner and Sweet before him at the time the invention was made, to modify a report document taught by Wagner to include a PDF document as taught by Davis, because Wagner teaches outputting a report document (p.3, para. 44; p.6, para. 73) and Sweet teaches a PDF report (col. 9, lines 44-50) so creating the report in a PDF format would allow users operating on different systems to correctly view the report.

Regarding dependent claim 10, Wagner does not disclose automatically generating additional pages of the output report document as necessary to incorporate the entirety of the data source information into the output report document. Sweet teaches additional pages for incorporating the entirety of the information (col. 2, lines 28-40; col. 14, lines 34-46). It would have been obvious to one of ordinary skill in the art, having the teachings of Wagner and Sweet before him at the time the invention was made, to modify a report document taught by Wagner to include additional pages for the entirety of the information as taught by Davis, because Wagner teaches outputting a report document (p.3, para. 44; p.6, para. 73) and Sweet teaches a PDF report with additional pages (col. 2, lines 28-40; col. 9, lines 44-50; col. 14, lines 34-46) so creating

the report in a PDF format would allow users operating on different systems to correctly view the report.

8. Claim 14 remains rejected under 35 U.S.C. 103(a) as being unpatentable over Wagner in view of Morita et al. (U.S. Pub. No. 20030076995; publication date April 24, 2003; filed December 9, 2002; continuation of application filed August 31, 1999).

Regarding dependent claim 14, Wagner does not disclose the field descriptive information further includes field coordinate information. Morita teaches field coordination information (p.9, para. 84). It would have been obvious to one of ordinary skill in the art, having the teachings of Wagner and Morita before him at the time the invention was made, to modify field descriptive information as taught by Wagner to include field coordinate information as taught by Morita, because Wagner teaches creating a financial form using field descriptive information (p.3, para. 44, 46; p.6, para. 73) and Morita teaches creating a financial form using field coordinate information (p.2, para. 35; p.9, para. 84).

9. Claims 16-18 remain rejected under 35 U.S.C. 103(a) as being unpatentable over Wagner in view of Burt (U.S. Patent 6990480; date of patent January 24, 2006; filed January 31, 2003; continuation of application filed September 18, 2000).

Regarding dependent claim 16, Wagner does not disclose a query field, the data source information including a value associated with the query field. Burt teaches a query field and data associated with the field (col. 15, lines 66-67; col. 27, lines 20-22).

It would have been obvious to one of ordinary skill in the art, having the teachings of Wagner and Burt before him at the time the invention was made, to modify fields taught by Wagner to include a query field as taught by Burt, because Wagner teaches creating a financial form using fields (p.3, para. 44, 46; p.6, para. 73) and Burt teaches creating a financial form using a query field (col. 15, lines 66-67; col. 27, lines 20-22; col. 43, lines 63-65).

Regarding dependent claim 17, Wagner does not disclose an aggregation field having a value based upon the value of the first of the plurality of fields and a third of the plurality of fields. Burt teaches an aggregation field with a value based on other fields (col. 30, lines 31-35). It would have been obvious to one of ordinary skill in the art, having the teachings of Wagner and Burt before him at the time the invention was made, to modify fields taught by Wagner to include an aggregation field as taught by Burt, because Wagner teaches creating a financial form using fields (p.3, para. 44, 46; p.6, para. 73) and Burt teaches creating a financial form using an aggregation field (col. 30, lines 31-35; col. 43, lines 63-65).

Regarding dependent claim 18, Wagner does not disclose a calculated field having a value produced by execution of a script. Burt teaches a calculated field and a script for performing the calculations (col. 27, lines 20-22; col. 51, lines 50-62). It would have been obvious to one of ordinary skill in the art, having the teachings of Wagner and Burt before him at the time the invention was made, to modify fields taught by Wagner to include a calculated field as taught by Burt, because Wagner teaches creating a financial form using fields (p.3, para. 44, 46; p.6, para. 73) and Burt teaches

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creating a financial form using a calculated field (col. 27, lines 20-22; col. 43, lines 63-65; col. 51, lines 50-62).

Response to Arguments

10. Applicant's arguments filed 9 April 2007 have been fully considered but they are not persuasive.

The applicant's initial argument is based upon the belief that Wagner fails to teach designing report files (page 11). However, the applicant's claims define the method of designing a report file. This method of designing the report filed is specified by the claim limitations (claim 1, lines 3-11). Therefore, because Wagner meets these claim limitations, Wagner must describe a method for designing report files.

The applicant further argues that Wagner fails to teach, "specifying a structure of the report file by defining a first report group comprised of one or more page definitions, the first report group being of a first report group type selected from among a plurality of predefined group types (page 12). The examiner respectfully disagrees.. Wagner discloses processing data acquired by the data acquisition module (paragraph 0043). Based upon a plurality of filters and the acquired data (paragraph 0043) a form generation module generates a form using the filtered acquired data (paragraph 0044). Therefore, the structure of the report is specified based upon the acquired data and filter module.

The applicant further argues that Wagner fails to disclose "associating a first data source with the first report group (page 13)." The examiner respectfully disagrees.

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Wagner teaches retrieving data from a remote location (paragraph 0041). This retrieved data is then used in conjunction with a form generation module in order to generate a form (paragraph 0044). Therefore, the remote data is associated with the form, in that both the form data and retrieved data are linked together, or associated.

Finally, the applicant argues that Wagner fails to disclose selecting from among a plurality of available data sources (page 14). Again, the examiner respectfully disagrees. Wagner discloses a plurality of information (data) sources (Figures 1a-2b). In these figures, data is retrieved from a database for use in generation of form data (paragraph 0031).

Conclusion

Any inquiry concerning this communication or earlier communications from the examiner should be directed to Kyle R. Stork whose telephone number is (571) 272-4130. The examiner can normally be reached on Monday-Friday (8:00-4:30).

If attempts to reach the examiner by telephone are unsuccessful, the examiner's supervisor, Stephen Hong can be reached on (571) 272-4124. The fax phone number for the organization where this application or proceeding is assigned is 571-273-8300.

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Information regarding the status of an application may be obtained from the Patent Application Information Retrieval (PAIR) system. Status information for published applications may be obtained from either Private PAIR or Public PAIR. Status information for unpublished applications is available through Private PAIR only. For more information about the PAIR system, see <http://pair-direct.uspto.gov>. Should you have questions on access to the Private PAIR system, contact the Electronic Business Center (EBC) at 866-217-9197 (toll-free). If you would like assistance from a USPTO Customer Service Representative or access to the automated information system, call 800-786-9199 (IN USA OR CANADA) or 571-272-1000.

Kyle R Stork
Patent Examiner
Art Unit 2178

krs



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SUPERVISORY PATENT EXAMINER